

Manager User Guide (Expenses)

Human Resources
Financial & Legal Services

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Overview

Employee Self Service (ESS) and Manager Self Service (MSS) provides managers and staff with the ability to update personal details, view payslips and book annual leave via a secure web-based portal called myHR, saving unnecessary paperwork and administration.

e-Expenses is a module contained within myHR which allows staff to record their expenses and submit for manager authorisation electronically.

The e-Expense module is to be used for claimed expenses. Fees for additional work, which have previously been claimed on the Fees and Expenses Form (Fin1A,) will, for the foreseeable future, continue to be claimed via the paper copy Fin1A.

Policies governing usage

This portal contains personal data about staff. Before accessing, you must make sure you are familiar with your obligations under the University's [Data Protection Policy](#) and the University's [IT policies](#).

In addition, e-Expenses is also subject to our own internal policies and procedures, as well as governance and restrictions issued by HMRC. These include, but are not limited to:

- [Financial regulations](#)
- [Travel, subsistence and other expenses policy](#)
- [Entertainment-related expenses and hospitality](#)

The data contained in this portal must not be downloaded, copied or stored on any unsecure (unencrypted) device.

Environmental Impact

The e-Expenses module is an invaluable tool to the University to enable us to measure and manage our carbon footprint caused by travel. Please support this initiative by providing as much information as possible when claiming expenses for mileage or other travel, including vehicle and fuel type or airport codes.

Help

We hope that both ESS and MSS are intuitive and straightforward to use. This guide will lead you through some key functions. However, if you require further assistance, please email myHRsupport@mmu.ac.uk.

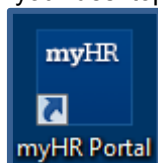
Feedback

The system has been designed through extensive consultation and has been thoroughly tested. However, we recognise that there is always room for improvement and we are glad to hear any suggestions. If you have any suggestions for improvements or enhancements please email feedbackonmyHR@mmu.ac.uk.

Manager Self Service (ESS)

Logging in and out

To log on to **myHR**, Click on the **myHR** icon on your desktop.

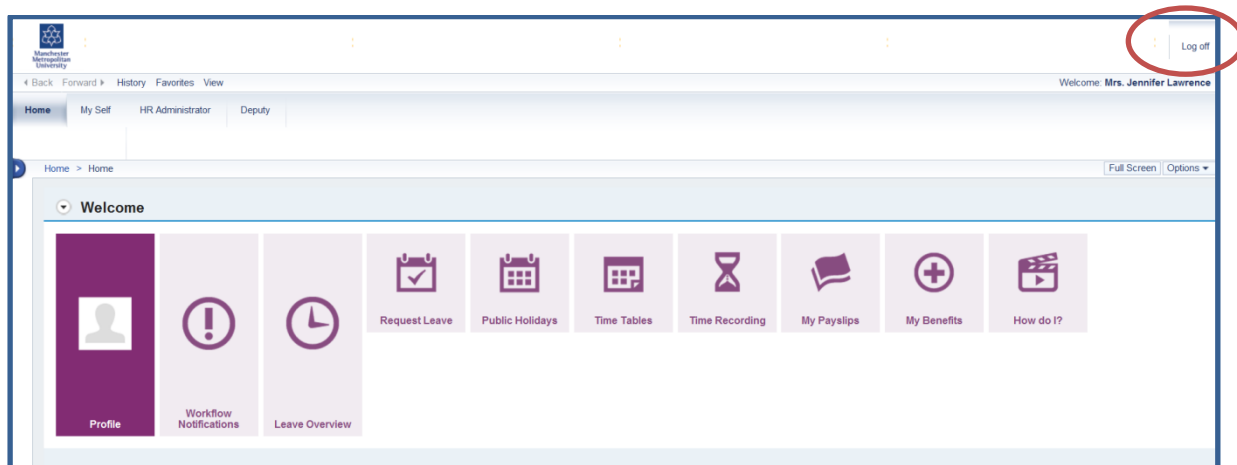


Logging in is straightforward – just enter your usual MMU credentials in the boxes.

The login page for the myHR portal. On the left is the Manchester Metropolitan University logo. On the right is the 'myHR' logo. Below the logo is a login form with two fields: 'MMU ID *' with the value '55112034' and 'Password *' with masked characters. A 'Log On' button is below the password field. A red speech bubble points to the password field with the text: 'Input your usual MMU log in details here, then click Log On.' Below the login form is a disclaimer: 'This portal contains personal data about staff. Before accessing, you must make sure you are familiar with your obligations under the University's Data Protection Policy at: [Data Protection Policy](#) and the University's IT policies at: [IT Policies](#). [The data contained in this portal must not be downloaded, copied or stored on any unsecure (unencrypted) device].'

Logging out is equally easy. Just click 'Log off' in the top right hand corner from any page. You will be prompted "Are you sure you want to log off?" (to ensure you don't click this by accident).

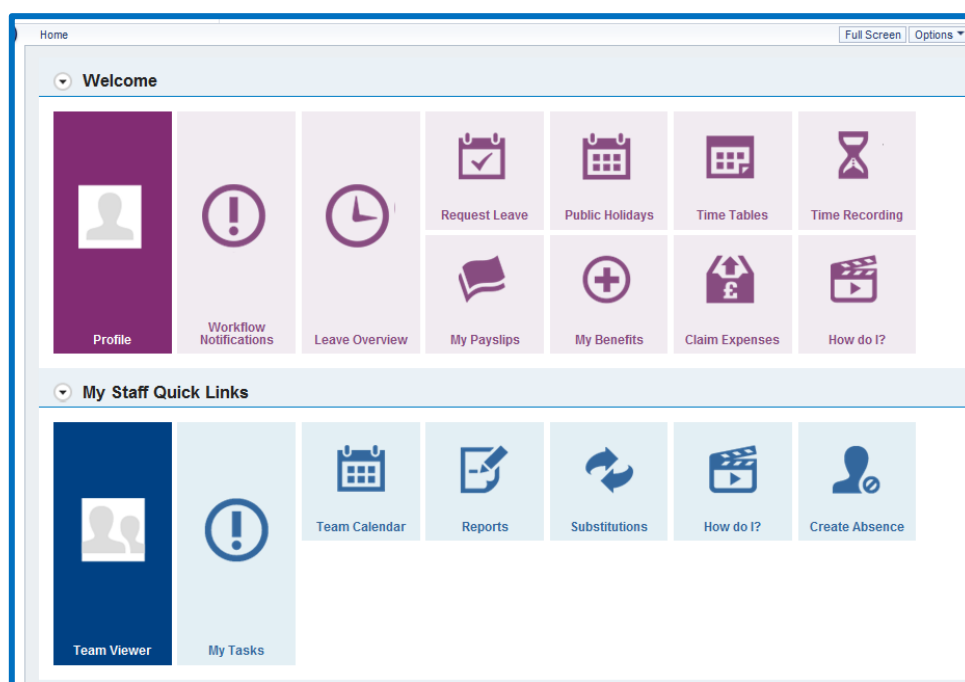
The system will automatically log you out after 15 minutes of inactivity.



The Home Page

When you log in, you will go straight to the Home page, which has quick links to many of the key features of myHR. All staff will see the top section in purple. Staff with line management responsibility will also see the bottom section in blue, which allows you to respond to requests from your team, run reports and nominate a substitute to handle certain functions on your behalf.

To manage your staff's expense claims, click on the "My Tasks" icon, and then "Expense Reports for Approval".



Before you start...

A few handy hints to get your started:

- Only one expense report can be generated per date or period. This means that if your staff member has several claims to make for one day (e.g. mileage and lunch), they should include those in the same report.
- Employees cannot claim for expenses until they have actually been incurred. For example, mileage can only be claimed once the trip has been made, it cannot be claimed in advance. However, they could save an expense claim as a draft, and then submit it for approval once the expense has been incurred.
- If an employee needs to make an amendment, that's fine. However, they'll need to edit the original submission (even if it has already been paid) – they can't just submit a new trip with the additional item.
- Employees will submit their Expense Summary Statement, along with any receipts, directly to Payroll. You may ask to see receipts before they are sent to Payroll in line with the policy in place within your department.
- The dates must correspond to the trip dates (unless there is a good reason why not, for example, a hotel paid in advance).
- HMRC rules stipulate that credit card and debit card slips and bank statements are not acceptable as receipts. Employees who submit these should have their whole claim returned for amendment.
- Expenses will be reimbursed in the first available payroll after both the following have been met:
 - Manager approval via myHR
 - Where applicable, original receipts and Expense Summary Statement received and checked by Payroll.

My Staff > Overview > My Tasks and Approvals Full Screen Options

My Tasks and Approvals

Workflow Tasks Notifications (3) Work Items (0)

Time Management Working Time Approval (1) Leave Approval (3)

Task Monitoring Current Month (0) Next Month (0) Previous Month (0)

Trips for approval Expense Reports for Approval (3)

Trips for approval - Expense Reports for Approval

View: MMU Approve Reject Export

Employee	Start Date	End Date	Total Cost	Currency	Submit Status	Assigner	Attachments
Miss Jennifer Lawrence	10.02.2014	10.02.2014	14.60	GBP	First Submission	Dr David Boreanaz	Add
Miss Jennifer Lawrence	03.03.2014	03.03.2014	4.80	GBP	First Submission	Dr David Boreanaz	Add
Miss Jennifer Lawrence	17.03.2014	17.03.2014	2.25	GBP	First Submission	Dr David Boreanaz	Add

To review the details of the expense claim, click on the row you wish to review. Scroll down to the bottom of the screen to view some high level details of the expense claim. Click Display/Print to see a full report.

Details of Trip: (0000100085)

Employee: Miss Jennifer Lawrence	Start Date: 10.02.2014	Total Cost: 14.60 GBP	Exception Ind.: No
Personnel No.: 66013303	Start Time: 00:00	Reimbursement: 14.60 GBP	Policy Violation: No
MMU ID: 55111654	End Date: 10.02.2014	Difference Amount: 0.00 GBP	Attachments: Add
Country: Great Britain	End Time: 00:01	Advance: 0.00 GBP	Facsimiles: (0)
Destination:			Receipts: (1)
Trip Schema: Domestic trip			Submit Status: First Submission
Reason:			

Approve Reject Display/Print

Cost Centre / WBS Charging Assignment

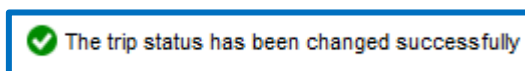
When you click 'Display/Print' to see a full Expense Summary Statement, you'll be able to see the Cost Centre/WBS(s) that will be charged.

If you are being asked to approve items of expenditure that relate to a budget outside your area of responsibility, the claimant should provide you with evidence that the appropriate budget holder has approved this charge. In this case, look for an attachment in the far right hand column e.g. memo or email from budget holder approving the expenditure.

Authorising expense claims

When an employee submits their claim, they will send their Expense Summary Statement, along with any receipts, to Payroll. As a manager, you may ask to see receipts before they are sent to Payroll in line with the policy in place within your department.

To authorise a claim, highlight the row you wish to approve and click Approve. You will receive a message to confirm that the claim has been approved, and your employee will receive a notification in their myHR area.



Expenses will be reimbursed in the first available payroll after both the following have been met:

- Manager approval
- Where applicable, original receipts and Expense Summary Statement received and checked by Payroll.

Partial approval

You cannot partially approve expense claims, e.g. approve the mileage but reject the car park charge. You must reject the whole claim. You can add further detail in the Notes section when rejecting.

Rejecting expense claims

To reject a claim, go to My Tasks from the myHR homepage, and select My Tasks and Approvals. Click the Expense Reports for Approval link.

From here, highlight the row of the claim you wish to reject by clicking in the box to the left of the claim, and scroll down the bottom of the page

[illegible]

Click Reject. You will be given the opportunity to provide a reason for rejection in a free text box. To complete the process, click Submit. Your employee will receive an email to their MMU address to notify them that their claim has been rejected.

Details of Trip: (0000100160)

Employee: Miss Jennifer Lawrence	Start Date: 26.04.2014	Receipts: (1)	Exception Ind.: No
Personnel No.: 66013303	Start Time: 00:00	Total Cost: 33.75 GBP	Policy Violation: No
MMU ID: 55111654	End Date: 26.04.2014	Reimbursement: 33.75 GBP	Attachments: Add
Country: Great Britain	End Time: 00:01	Difference Amount: 0.00 GBP	Facsimiles: (0)
Destination:		Advance: 0.00 GBP	Receipts: (1)
Trip Schema: Domestic trip			Submit Status: First Submission
Reason:			

Reason for Rejection

More information required on the business purpose - please provide the name of the conference you attended.

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